

# Adoption Reporting

This guide showcases how to run adoption reports for your portfolio or individual LLC

## Transactions and Your Adoption Rate

### To see the number and types of payments for a given period

1. Log in as an admin to your ClickPay Portal and from the **Financial Reports** tab, select **Transaction Summary**. For a specific LLC, under **LLC/Association**, select the property you'd like to analyze. For a portfolio-wide analysis, leave the report as it is.



2. You can look at payment adoption over any period of time. To see payments in a single billing cycle, you can either look at the calendar month or look at the days leading up to and after the 1st of that month.

*For example: To search for one billing cycle of payments, under Transaction Date, select the 16th of the previous month to the 15th of the month you are analyzing. i.e.: For the June 2022 billing cycle, search the date range 5/16/22 - 6/15/22.*

3. Select ACH, Credit Cards, Online Banking, LBX, and Cash. **For Charge/Credit**, select charge.
4. Click search and you will be provided with a report detailing the total number of payments broken down by each payment type. To download the portfolio-wide summary, under Search Results, select your format type (XLS, CSV) and click export. To download the report with transactions broken down by property, select a format underneath the management name and click export.

#### Search Results

Management	Total		Credit Card	
	#	Amount	#	Amount
NorthPeak...	197	\$1,127,173.58	8	\$23,142.74

  

LLC/Association	Total		Credit Card	
	#	Amount	#	Amount
123 River LLC - 123 Any Street	2	\$73,198.40	0	\$0.00
456 Peak LLC - 456 Any Street	1	\$23,948.45	0	\$0.00

5. To get your **Adoption Rate**, divide the total electronic payments (Credit Cards, ACH, Online Banking, Cash, EFT) by your total payment count.

*For example: 400 payments divided by 800 total payments = 50% electronic adoption rate*

6. If you do not utilize ClickPay's lockbox product, simply divide the total number of electronic payments by your active unit count.

*For example: 300 payments divided by 500 active units = 60% electronic adoption rate*